



### Large Faith-Based Organization streamlines benefits and billing to create overall better customer service.

#### CHALLENGE

To update a large faith-based organization's outdated IT infrastructure and provide its entities and members with a centralized, automated solution to access and manage their benefits and billing information.

#### SOLUTION

Morneau Shepell developed an updated and centralized database to consolidate human resource changes, health and welfare administration, pension administration, risk management information and a billing solution to support consolidated invoices for all services.

#### RESULTS

The religious entity has realized more efficient operations and higher customer satisfaction through Morneau Shepell's customized solutions including:

- Streamlined benefit and billing systems
- Eliminated data entry duplication
- Improved accuracy of information
- Increased transparency between entities and members

#### CHALLENGE

This large faith-based organization offers pension benefits, health, dental, disability, flexible spending accounts and life insurance coverage to 26,000 eligible lay employees and clergy of its 1,200 entities (mostly churches and schools). The outdated IT infrastructure supporting the administration and billing of these benefits relied on multiple touch points and required duplication of data entry throughout the organization. Inaccuracies and outdated information resulted in errors and, in some instances, generated 10-12 separate bills per month for each program in which the entity participated.

The organization is comprised of two very different groups of members including large, more technologically advanced entities and also smaller, less tech savvy entities. Some of the smaller entities requested a simple-to-use process and were initially resistant to change, while larger, more tech-advanced members wanted something cutting edge.

The organization needed a centralized and automated platform to streamline and simplify the administration and billing of the benefits. In addition, it needed to allow each entity to individually elect to participate in these programs and provide consolidated billing. Equally important, the implementation timeline had to balance the needs of those looking to quickly move forward and those slower to adopt new solutions.

## SOLUTION

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This large faith-based organization's trusted IT consultant, recommended that they engage with Morneau Shepell to update their benefit administration to better serve organizational needs and keep pace with entity and member needs. The two entered into a long-term partnership with a phased approach to replacing the outdated systems and processes.

On January 1, 2014, the religious entity went live with all aspects of billing — health and welfare, pension and insurance products — enabling more efficient operations and higher customer satisfaction. Fall of 2014 saw the launch of the organization's Open Enrollment portal for eligible employees. In January of 2015, a portal went live for newly eligible employees to enroll online with health and welfare benefits. Backoffice pension processes, a portal for pension estimates, pension trustee files and a manager portal for billing invoice/report delivery is on tap for quarter 1 and quarter 2 of 2015.

Today, a single, integrated platform is supported by a centralized and consolidated database that:

- Supports a new benefits administration system
- Moves data entry from the religious entity coordinators to end users
- Maximizes electronic data interfaces to reduce redundancy
- Minimizes paper usage
- Consolidates invoicing and payments

## RESULTS

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By redesigning the organization's IT services and capabilities, Morneau Shepell was able to consolidate all member benefit information and billing solutions into a more streamlined and accessible process. Instead of entities receiving 10 or more bills at the end of every month, entities receive one standardized bill with supporting detailed reports. This function provides more transparency to its entities as it allows them to view their benefit details in one centralized and automated location. Consolidation also allows for more data accuracy. With more tools and customized solutions in place, members have the ability to be more engaged in utilizing this system.

Since the inception of the transformed database, member awareness and engagement are at an unprecedented level. Moreover, these updates have created cost-effective savings for the religious entity both in time and materials. This large faith-based organization has not only successfully improved their business functionality, they have also provided better results for their members.

Morneau Shepell is a North American company with global reach offering an integrative approach to health, benefits, retirement and employee assistance needs. In the United States, Morneau Shepell provides expertise in plan administration, retirement solutions and billing management with a highly flexible technology platform that improves its clients' performance. With nearly 50 years of experience, the company has 3,600 employees and serves more than 20,000 clients ranging from health plans, small businesses, large corporations, associations, unions and local and state governments. For more information, visit [morneaushepell.com](http://morneaushepell.com)